



COUNTY OF SAN DIEGO
Great Government Through the General Management System – Quality, Timeliness, Value
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

SUPERVISING DEPUTY PUBLIC ADMINISTRATOR/GUARDIAN

Class No. 003637

■ CLASSIFICATION PURPOSE

To supervise Deputy Public Administrators/Guardians, Estate Assistants, and support staff; to perform difficult investigations relating to the estates of deceased persons and conservatees referred or appointed to the Public Administrator/Guardian by the courts or as required by law; and to perform related work as required.

■ DISTINGUISHING CHARACTERISTICS

This class is the supervisory level in the Deputy Public Administrator/Guardian series. Supervising Deputy Public Administrators/Guardians report to the Assistant Public Administrator and are responsible for providing first-line supervision for Deputy Public Administrators/Guardians, Estate Assistants, and support staff

■ FUNCTIONS

The examples of functions listed in the class specification are representative but not necessarily exhaustive or descriptive of any one position in the class. Management is not precluded from assigning other related functions not listed herein if such duties are a logical assignment for the position.

Essential Functions:

1. Plans, organizes, schedules, assigns, trains, and evaluates the work of Deputy Public Administrators/Guardians, Estate Assistants, and support staff.
2. Provides technical direction and guidance to Deputy Public Administrators/Guardians who act as conservators and make financial and personal decisions for conservatees.
3. Assists the Public Administrator and Assistant Public Administrator by developing, revising, and implementing goals, objectives, policies, and procedures of the Public Administrator/Guardian's Office.
4. Interacts with representatives of other County departments and outside agencies to coordinate activities and identify and implement best practices for the Public Administrator/Guardian's Office.
5. Monitors Targeted Case Management activities and reviews reports for compliance and conformance with the policies of the Public Administrator's Office.
6. Performs investigations to determine if estate administration or conservatorship of the person or estate is warranted.
7. Collects and verifies conservatee information by conducting interviews with significant persons.
8. Conducts searches for personal property and researches records, reports, and other information sources.
9. Conducts all financial activities for an estate including closing bank accounts, redeeming securities, arranging payments for medical expenses, contracting for services, and applying for estate benefits.
10. Investigates eligibility and authorizes payment for disposition of property in accordance with the indigent burial regulations.
11. Reviews and determines the validity of claims against an estate.
12. Recovers and secures estate assets and personal property.
13. Makes decisions regarding sale or distribution of estate assets.
14. Prepares inventories of assets or reviews inventories prepared by staff.
15. Reviews estates to determine those assets available for funeral and last illness expenses.

16. Determines ownership of real property.
17. Maintains contact and advises beneficiaries or relatives of estate throughout the administration process.
18. Works with various county departments to conduct estate matters.
19. May recommend authorized medical treatment or actions by doctors or other medical professionals.
20. Provide responsive, high quality service to County employees, representatives of outside agencies and members of the public by providing accurate, complete and up-to-date information, in a courteous, efficient and timely manner.

■ KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of:

- Supervision, training, and coaching principles, methods, and techniques.
- Laws, regulations and codes relating to the Public Administrator/Guardian function.
- Procedures of Probate Court used in administering decedent and conservatorship estates.
- Legal terminology used in conducting decedent and conservatorship cases.
- Documents used in estate management, fiduciary transactions, and real property transactions.
- Concepts of wills, insurance policies, deeds, contracts and other applicable legal documents.
- Public and private community resources for meeting the personal needs of conservatees.
- Estate and financial investigative methods and techniques.
- Methods of identifying, protecting, and managing assets.
- County customer service objectives and strategies.

Skills and Abilities to:

- Plan, direct, coordinate, schedule, assign, train and evaluate the work of employees.
- Act as a conservator for elderly or terminally ill clients and manage a conservatorship caseload.
- Conduct financial investigations by collecting and verifying information and preparing reports.
- Read, understand, and interpret documents used in estate management (i.e. contracts, bank records, promissory notes) and in real property transactions (deeds, payment records, rental receipts).
- Read, understand, interpret, and apply laws and regulations related to estate administration and administrative reports.
- Develop and implement policies and procedures pertaining to the activities of the Public Administrator/Guardian's Office.
- Make logical and sound decisions in order to conduct financial affairs and financial transactions on behalf of clients.
- Make logical and sound decisions relating to legal, social, medical, and psychiatric treatment and services for clients.
- Identify actual and potential problems that may affect the operations of the Public Administrator/Guardian's Office to identify effective resolutions.
- Establish and maintain work teams and coordinate activities between the Public Administrator/Guardian's Office and other County departments and outside agencies.
- Communicate verbally and in writing in an effective and tactful manner when interacting with clients, family members of clients, and other persons who are mentally disabled, or who are upset, hostile, uncooperative, or under emotional stress.
- Provide information for preparing legal documents that is accurate and complete.
- Maintain accurate and complete records and reports.
- Perform basic mathematical computations.
- Establish effective working relationships with management, employees, employee representatives and the public representing diverse cultures and backgrounds.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or referral.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. Examples of qualifying education/experience are: a bachelor's degree from an accredited college or university with a major in Gerontology, Social Work, Business Administration, Public Administration, or a closely related field AND five (5) years of professional experience with a public or private agency managing a caseload with the goal of meeting the personal and financial needs of clients, or performing related field investigative work.

■ ESSENTIAL PHYSICAL CHARACTERISTICS

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification. Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.

Incumbents may be required to lift and carry personal belongings weighing up to 60 pounds and carry such items up or down flights of stairs and load into a vehicle. Constant: sitting and lifting and carrying items weighing up to 25 pounds. Frequent: walking, standing, twisting of waist, use of dominant hand, repetitive use of hands, simple grasping and fine manipulation with hands, reaching above and below shoulder level. Occasional: bending of neck and waist, squatting, climbing, kneeling, crawling, twisting of neck, power grasping with hands, pushing and pulling with hands, and lifting and carrying items weighing up to 100 pounds.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own vehicle.

Certification/Registration

None required.

Working Conditions

Incumbents travel throughout San Diego County to conduct fieldwork on a frequent basis. Incumbents work in settings that may be uncertain and unpleasant. Incumbents may be exposed to unpleasant sights, smells, insects, and rodents.

Field work and warehouse work is required, and incumbents are exposed to: working around equipment and machinery, walking on uneven ground, excessive noise, extremes in temperature, humidity or wetness, dust, gas, fumes, or chemicals, working at heights and working with bio-hazards such as blood pathogens in the course of conducting investigations at residences.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Probationary Period

Incumbents appointed to permanent positions in this class shall serve a probationary period of 6 months (Civil Service Rule 4.2.5).

**New: August 24, 1976
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